

# ACTION LEARNING FACILITATION CERTIFICATE PROGRAM

March 19-22, 2014 Shanghai China



## LEARNING OBJECTIVES

*Upon completion of this workshop you will be able to*

- ✎ Understand the Action Learning process, including key principles, mindsets, concepts, and practices
- ✎ Experience the power of Action Learning for addressing problems and opportunities, and the deep learning that comes from the process
- ✎ Experience the primary variants of Action Learning
- ✎ Understand the larger context within which the Action Learning process occurs, including programs, key roles and responsibilities, and criteria for success
- ✎ Enhance basic skills in asking powerful questions to identify relevant, realistic, and challenging actions to address priorities and generate deep learning at the same time
- ✎ Develop foundational skills to serve as a useful member of an Action Learning Team
- ✎ Develop the skills necessary to facilitate Action Learning sessions
- ✎ Generate a list of potential applications for Action Learning for your organization



Organized By



**Please Contact: HREC / Marketing**

Mail: 1701, Imago Tower, 99 Wu Ning Road Shanghai, 200063

Tel: +86 21 6056 1858 Fax: +86 21 6056 1859

Email: [marketing@hrecchina.org](mailto:marketing@hrecchina.org)

Website: <http://www.hrecchina.org>

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## »» INSTRUCTOR BIO



**Chuck Appleby**  
**Ph.D.**

Chuck Appleby is a leadership and organization development consultant with over 30 years of management, consulting, and coaching experience in government, industry, and non-profits. Chuck provides clients with assistance in strategy development, organizational assessment, work system design, leadership development, coaching, and change management.

He has a Ph.D. in International Relations for The Johns Hopkins University's School of Advanced International Studies, and a B.A. in History and Economics from Dartmouth College.

Chuck has extensive industry experience with global companies including Microsoft, Manulife Financial, Wells Fargo, Exelon, Rolls Royce, Nielsen, BAE Systems, and iRobot.

Chuck is the co-founder of Action Learning Source—a partnership with Authenticity Consulting. Action Learning Source was created to teach the wide range of approaches to Action Learning and to continuously improve the practice of Action Learning. He is also a founding member of the World Institute for Action Learning (WIAL).

Chuck is an adjunct faculty member in the Human and Organization Learning Program at The George Washington University and in the Organizational Development Certificate Program at Georgetown University. His publications include Charles A. Appleby, Carl L. Harshman, Milan D. Larson, and John R. Latham,

"CEO Attitudes and Motivations: Are They Different for High-Performing Organizations?",

**Quality Management Journal**, Volume 19, Issue 4.



## »» CLIENTS WHO HAVE EXPERIENCED ACTION LEARNING FACILITATION AND FACILITATION TRAINING WITH DR. APPLEBY

- |                       |  |
|-----------------------|--|
| + Microsoft           | + John Hancock                                 |
| + ICF International   | + Manulife Financial                           |
| + Booz Allen Hamilton | + Allstate                                     |
| + Disney Studios      | + U.S. Department of Agriculture               |
| + BAE Systems         | + U.S. Department of Energy                    |
| + Goodrich            | + Georgetown University                        |
| + Elliott Turbo       | + George Washington University                 |
| + Exelon              | + Children's National Medical Center           |
| + URS                 | + American Society of Training and Development |
| + Travelers           |  |
| + Wells Fargo         |  |



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## »»» TESTIMONIALS

• "Chuck is a talented and committed Action Learning coach. In his work with our high potentials, he both supported the team's learning and helped them reach tangible outcomes. I appreciate his focus on results and his energy."

**Shannon Banks**  
HR Director  
Microsoft

• "In today's fast-paced, highly competitive environment, developing skilled and knowledgeable leaders at every level is our only true competitive advantage. In my organization, we have found that Action Learning is a highly effective way to develop leaders and solve difficult problems at the same time. Action Learning is a technique that is well worth the investment. I can think of no better trainer than Dr. Chuck Appleby to introduce you to this useful technique. Chuck is an energetic and resourceful trainer with deep experience in training this topic."

**Emma Kindle**  
Training Manager  
Arlington County Government

• "Chuck Appleby is an original, trustworthy, talented, and passionate professional. He is able to work with diverse people of all backgrounds and experience; consequently, he orchestrates a safe learning environment where individuals and teams get to the heart of the issue and solve challenges using applicable, actionable strategies. I highly recommend Chuck, and, in fact, have hired him to teach Action Learning on multiple occasions."

**Susan Langlitz, Ph.D.**  
Associate Professor, Business Communication & Strategy  
the George Washington University

• "Action Learning, as taught by Dr. Chuck Appleby, is the most powerfully practical coaching framework I've experienced in years."

**Carol Goldsmith**  
PCC, NLPT, President-Elect  
ICF Metro DC Charter Chapter

• "We have grown tremendously as a resource to our organization for Action Learning as a result of Appleby & Associates. Chuck's keen and practical wisdom coupled with real and relevant experiences in Action Learning were the key reasons we wanted our training provided by Appleby & Associates. He continues to be a resource for us and the scope is truly more encompassing than Action

Learning, offering the array of tools, processes, models that enable learning and problem solving that is most powerful!"

**Lily Bowen**  
2nd Vice President Leadership & Organization Development  
Fortune 100 and Dow Company, Travelers Insurance

• "I have worked hand-in-hand with Chuck Appleby to deliver numerous mid-career leadership programs to our clients. These programs have, at their foundation, Action Learning projects and Executive Coaching services facilitated by Chuck and his associates. Chuck's coaching expertise and mastery of the Action Learning process truly set him apart from other providers. He wholly invests himself in each program we deliver, and his integrity, passion, insight, and boundless energy have had a profound positive and measurable impact on participants and their organizations."

**Stephan Wronski**  
President  
RJ Wronski Associates, Inc.

• "Chuck Appleby is a masterful instructor of Action Learning. He is passionate about the power of Action Learning, and this always shows up in his work with leaders, organizations, and coaches. While I value Chuck's deep experience coaching Action Learning teams from many different types of organizations around the world, what I value most is the way he demonstrates in all of his work the core practices of Action Learning: inquiry, reflection, and experimentation. He cares about his clients and uses these skills to help them achieve success and build organizational and individual capacity."

**Valerie Lingeman**  
Strategic Leadership Development Program Manager  
U.S. Government

• "The concepts identified in the Action Learning course made this one of the most powerful training sessions that I have experienced in my 13 years in the training and development field. I was able to take the content and immediately put it to use, creating a dynamic of self-awareness for all of the project participants that typically is not found in a regular classroom setting."

**Susan Mitnick**  
Senior Director  
Sales Training, Cbeyond

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## »»» WORKSHOP OVERVIEW

Action Learning is used around the world as an innovative, powerful, and practical approach to address problems and opportunities for individuals, teams, and organizations. It creates a safe environment for developing leadership mindsets and skills. Finally, it fosters the development of a peer coaching culture. The ability of peers to come together and solve difficult challenges is one of the great untapped resources in organizations today.

This four-day interactive workshop orients participants to the Action Learning process. The experiential approach places an emphasis on practicing the skills used in successful Action Learning groups. The program starts with several hours of pre-reading and viewing videos. Participants are expected to come to the workshop with at least one current, important priority (problem or opportunity) to address with help from fellow group members. The workshop includes short lectures, followed by practical exercises and experiences with substantial time for questions and answers.

Upon completion of the course, participants will receive an **Action Learning Facilitator Certificate** from Action Learning Source ([www.actionlearningsource.com](http://www.actionlearningsource.com))

## »»» WHO SHOULD ATTEND

The program is designed for HR professionals, learning and development professionals, talent management professionals, leadership coaches, organizational development consultants, as well as employees and managers who want to develop their problem solving, facilitation, and coaching skills.



## »»» SUMMARY OF LEARNING APPROACH & METHODS

### ★ Approach

- 60% of the course is experiential with practice and feedback of the action learning process and tools.
- Based on adult development and learning theory

### ★ Methods

- Action Learning Participant and Coach Practice
- Pre Work: Articles and Videos
- Case Studies
- Observation and Feedback
- Dialog and Sharing of Learnings
- Tools
- References for Further Study

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## DAY ONE: INTRODUCTION TO ACTION LEARNING (THE MANY FACES OF ACTION LEARNING)

9:00-9:15	<b>Program Introduction</b> <ul style="list-style-type: none"> <li>Overview</li> <li>Guidelines for Participation</li> </ul>
9:15-9:30	<b>Participant Expectations:</b> What is the most important thing you intend to learn from this program?
9:30-10:30	<b>Introduction to the Variants and Applications of Action Learning</b> <ul style="list-style-type: none"> <li>Applications: Leadership Development; Problem Solving; Peer Coaching; Culture Change</li> <li>Variants: Individual Leadership Challenges; Organizational Challenges</li> </ul>
10:30-10:45	<b>BREAK</b>
10:45-11:15	<b>Asking Powerful Questions</b> <ul style="list-style-type: none"> <li>The Benefits of Powerful Questions</li> <li>Powerful Questions Model</li> <li>Powerful Questions Applications</li> </ul>
11:15-12:15	<b>Action Learning Practice #1 (Fishbowl Exercise) (Individual Challenge)</b> <ul style="list-style-type: none"> <li>Code of Conduct and Ground Rules</li> <li>The Participant's Experience      • The Problem Owner's Experience</li> </ul>
12:15-13:15	<b>LUNCH BREAK</b>
13:15-13:45	<b>The Coaching Framework (The "GROWL" Model)</b> <ul style="list-style-type: none"> <li>Goal Setting</li> <li>Options</li> <li>Learning and Reflection</li> <li>Reality of the Current Situation</li> <li>Willingness to Take Action</li> </ul>
13:45-15:00	<b>Action Learning Practice #2 (Fishbowl Exercise) (Individual Challenge)</b> <ul style="list-style-type: none"> <li>Understanding the Challenge      • Reframing the Challenge</li> </ul>
15:00-15:15	<b>BREAK</b>
15:15-16:00	<b>Tools for Clarifying (Framing) the Challenge</b> <ul style="list-style-type: none"> <li>McKinsey 7S</li> <li>Mindmaps</li> <li>Six Thinking Hats</li> <li>Five Whys</li> <li>Role Playing</li> <li>Visualization</li> </ul>
16:00-16:45	<b>Fostering Reflection and Deep Learning</b> <ul style="list-style-type: none"> <li>The KOLB Learning Cycle</li> <li>Single-, Double-, and Triple-Loop Learning</li> <li>The Learning Mindset and Learning Practices</li> </ul>
16:45-17:00	<b>Wrap Up Day 1, Day 2 Overview</b>

## DAY TWO: INTRODUCTION TO ACTION LEARNING (THE MANY FACES OF ACTION LEARNING)

9:00-9:30	<b>Day One Review and Questions</b>
9:30-10:15	<b>Selecting Challenges and Sponsors for Action Learning Sessions</b> <ul style="list-style-type: none"> <li>Problem Selection Criteria</li> <li>Problem Owner Selection Criteria</li> </ul>
10:15-10:30	<b>BREAK</b>
10:30-11:45	<b>Action Learning Practice #3 (Individual Leadership Challenge)</b> <ul style="list-style-type: none"> <li>Fostering trust in teams</li> <li>Promoting a safe and challenging learning environment</li> <li>Facilitator role</li> </ul>
11:45-12:15	<b>Capturing and Dispersing Learning in the Organization</b> <ul style="list-style-type: none"> <li>Creating a Coaching Culture</li> <li>Promoting Knowledge Sharing</li> <li>Cascading Action Learning Throughout the Organization</li> </ul>
12:15-13:15	<b>LUNCH BREAK</b>
13:15-13:45	<b>Overview of Best Practice Action Learning Programs</b> <ul style="list-style-type: none"> <li>Case Study: Software Industry</li> <li>Case Study: Financial Industry</li> <li>Case Study: Heavy Equipment Manufacturing</li> <li>Case Study: Local Government</li> </ul>
13:45-15:00	<b>Action Learning Practice #4 (Organizational Challenge)</b> <ul style="list-style-type: none"> <li>Maintaining team energy and engagement</li> </ul>
15:00-15:15	<b>BREAK</b>
15:15-16:15	<b>Establishing the Conditions for Success in Action Learning Programs</b> <ul style="list-style-type: none"> <li>Intended Outcomes</li> <li>Team Selection and Diversity</li> <li>Type of Problem</li> <li>Sponsor</li> <li>Program Management</li> <li>Organizational Commitment</li> </ul>
16:15-16:45	<b>Reflection on the Action Learning Experience and Application in the Workplace</b> <ul style="list-style-type: none"> <li>Individual Development</li> <li>Team Development</li> <li>Options for Applying Action Learning in Your Organization</li> </ul>
16:45-17:00	<b>Wrap Up and Overview of Day 3</b>

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## DAY THREE: ACTION LEARNING FACILITATION

9:00-9:30	<b>Review of the Variants of Action Learning</b>
9:30-10:15	<b>Foundations of Action Learning Facilitation</b> <ul style="list-style-type: none"><li>• Facilitator Mindsets</li><li>• Facilitator Skills</li><li>• Facilitator Attributes</li><li>• Facilitation Process</li></ul>
10:15-10:30	BREAK
10:30-11:45	<b>Action Learning Practice #5</b> <ul style="list-style-type: none"><li>• Promoting team independence of the facilitator</li></ul>
11:45-12:15	<b>Facilitating the Various Phases of an Action Learning Experience</b> <ul style="list-style-type: none"><li>• Problem Framing</li><li>• Problem Solution Development</li><li>• Commitment to Action</li><li>• Learning and Reflection</li></ul>
12:15-13:15	LUNCH BREAK
13:15-13:45	<b>Contracting with Program Sponsors</b> <ul style="list-style-type: none"><li>• Intended Outcome</li><li>• Time Constraints</li><li>• Scope Constraints and Boundaries</li><li>• Program Success Criteria</li></ul>
13:45-15:00	<b>Action Learning Practice #6</b> <ul style="list-style-type: none"><li>• Promoting commitment to action and accountability</li></ul>
15:00-15:15	BREAK
15:15-16:15	<b>Action Learning Practice #7</b> <ul style="list-style-type: none"><li>• Promoting team consensus</li></ul>
16:15-16:45	<b>Training and Equipping Group Members to Participate</b> <ul style="list-style-type: none"><li>• Methods of Instruction</li><li>• Learning Objectives</li><li>• Teaching Methods</li></ul>
16:45-17:00	Wrap Up and Overview of Day 4

## DAY FOUR: ACTION LEARNING FACILITATION

9:00-9:30	<b>Day Three Review and Questions</b>
9:30-10:15	<b>Ways of Addressing Common Challenges in Facilitating</b> <ul style="list-style-type: none"><li>• Team Challenges</li><li>• Individual Challenges</li><li>• Program Management Challenges</li></ul>
10:15-10:30	BREAK
10:30-11:45	<b>Action Learning Practice #8</b> <ul style="list-style-type: none"><li>• Handling Difficult Situations: Program Management Challenges</li></ul>
11:45-12:15	<b>Supporting Groups to Become Self-Facilitating</b> <ul style="list-style-type: none"><li>• Training Protocols</li><li>• Training Materials</li></ul>
12:15-13:15	LUNCH BREAK
13:15-13:45	<b>Strategies to Introduce Action Learning Into Organizations</b> <ul style="list-style-type: none"><li>• Peer Learning Circles</li><li>• Leadership Development Programs</li><li>• Problem Solving Teams</li></ul>
13:45-15:00	<b>Action Learning Practice #9</b> <ul style="list-style-type: none"><li>• Handling Difficult Situations: Team challenges</li></ul>
15:00-15:15	BREAK
15:15-16:15	<b>Action Learning Practice #10</b> <ul style="list-style-type: none"><li>• Handling Difficult Situations: Individual challenges</li></ul>
16:15-16:45	<b>Reflection on the Action Learning Experience</b> <ul style="list-style-type: none"><li>• Learning about self</li><li>• Learning about leadership</li><li>• Learning about problem solving</li></ul>
16:45-17:00	Wrap Up and Feedback



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## About HREC

To excel in an increasingly competitive and knowledge-driven business world, the HR Excellence Center (HREC) is a membership based platform which is created to improve the competencies and capabilities of HR practitioners and advance the development of HR as a profession in China.

When you become a HREC member, you enjoy access to a diversified range of HR Events and knowledge platforms discussing hottest issues and cuttingedging topics faced by HR practitioners in China, including HRD Networks, HR conferences, trainings & workshops, HR Frontier, HR industrial working group, monthly newsletters, website and other valued added services.

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Mail: 1701, Imago Tower, 99 Wu Ning Road Shanghai, 200063

Tel: +86 21 6056 1858 Fax: +86 21 6056 1859

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